First Hit   Fwd Refs

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L2: Entry 5 of 15   File: USPT   Nov 12, 2002

DOCUMENT-IDENTIFIER: US 6480599 B1
TITLE: Telecommunications system and method for automatic call recognition and distribution

Brief Summary Text (13):
The call processing center preferably includes, or is in communication with, at least one customer information database, associated with a service provider, containing information about customers of the service provider, and the call processing center is arranged to retrieve information about a customer from the customer information database, e.g. for display on a visual display unit at a workstation of a call handling agent of said service provider, prior to or simultaneously with the call processing center forwarding the telephone call to said agent.

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L9: Entry 4 of 19   File: USPT   May 6, 2003

US-PAT-NO: 6560604
DOCUMENT-IDENTIFIER: US 6560604 B1
** See image for Certificate of Correction **

TITLE: System, method, and apparatus for automatically and dynamically updating options, features, and/or services available to a client device

DATE-ISSUED: May 6, 2003

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Fascenda; Anthony C.	Rockville	MD		

US-CL-CURRENT: 707/10; 707/100, 707/103R, 707/104.1, 709/221

ABSTRACT:

A system, method, and apparatus for automatically and dynamically updating options, features, and/or services available to a client device operating in a client-server environment. The client device includes a client template database for storing templates defining a configuration of the client device. This configuration determines the options, features, and/or services available to a client device and the user of the client device. A server includes a server template database for storing the most current or latest versions of the templates used to configure the client device. When a user enters a user request at the client device, the client device transmits an associated information request to the server. The information request includes a client template identifier associated with the information request and a client template version identifier. The server receives the information request and compares the client template version identifier to a version identifier for a corresponding template in the server template database, to determine if the client device has the latest version of the template. If it does not, then the server transmits an information response message to the client, including a template update.

34 Claims, 25 Drawing figures
Exemplary Claim Number: 1
Number of Drawing Sheets: 20

First Hit   Fwd Refs

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L2: Entry 4 of 15   File: USPT   Apr 29, 2003

US-PAT-NO: 6557003
DOCUMENT-IDENTIFIER: US 6557003 B1

TITLE: Method and apparatus for multiple agent commitment tracking and notification

DATE-ISSUED: April 29, 2003

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Powers; James Karl	Carlsbad	CA		

US-CL-CURRENT: 707/102; 715/501.1

ABSTRACT:

A system for tracking client contacts for a host organization utilizes a multimedia
database and a user interface at a connected computer device. The database stores
client communications as full content, and relates contacts by issue, and the user
interface displays client contact communications as objects, such as icons, in
issue related chronological strings. In a preferred embodiment the interface also
provides an input facility for a host agent to select appropriate responses to
client communications, to make commitments for response, to assign responsibility
for commitments, and to notify personnel effected by entered commitments in various
ways, such as reminders. Other notifications include fulfilled and unfulfilled
commitments.

26 Claims, 3 Drawing figures
Exemplary Claim Number: 1
Number of Drawing Sheets: 3

Generate Collection

L2: Entry 8 of 15   File: USPT   Jul 10, 2001

DOCUMENT-IDENTIFIER: US 6259774 B1
TITLE: Apparatus and methods for coordinating telephone and data communications

Detailed Description Text (11):
When the user in customer site 104 is reviewing information on browser 116 or is
about to place an order, the user may request the attention of a service agent in
service assistance center 140. For example, the user may want to ask additional
information or provide confidential information (such as a credit card number)
orally to the service agent. It is desirable for the service agent to display on
his/her computer 146 the same web page displayed on browser 116 while interaction
with the user through telephone. It is also desirable for the service agent to
obtain as much information about customer site 104 as possible prior to commencing
telephone communication with the user.

☐   ▐ Generate Collection ▌

L5: Entry 11 of 24   File: USPT   Mar 12, 2002

DOCUMENT-IDENTIFIER: US 6356633 B1
TITLE: Electronic mail message processing and routing for call center response to same

Detailed Description Text (41):
Accordingly, because e-mail messages may now be handled as though they were calls that may be handled by a call center, call center systems can be used to provide statistics and reports related to call volume and activity may be generated based upon e-mail messages received at a call center. Accordingly, management reports may be generated based upon e-mail messages received at the call center and which are responded to by the same. Such reports may include agent-tracking statistics, time upon an agent system, and other such statistics based reports which are well known in the call center industry. For example, reports may be generated related to the average time between e-mail message receipt and response, average message handling time for each subject category, average message handling time per agent within a call center, number of messages exceeding defined handling times, agent availability statistics, number of messages in each incoming mailbox, average handling time for each incoming mailbox, and additional reports to be defined by users prior to system development and deployment in accordance with the present invention.

First Hit

☐ **Generate Collection**

L6: Entry 12 of 20   File: PGPB   Nov 14, 2002

DOCUMENT-IDENTIFIER: US 20020169834 A1
TITLE: Apparatus and methods for routing electronic mail in a processing center

Detail Description Paragraph:
[0081] When the user in customer site 104 is reviewing information on browser 1116 or is about to place an order, the user may request the attention of a service agent in service assistance center 1140. For example, the user may want to ask additional information or provide confidential information (such as a credit card number) orally to the service agent. It is desirable for the service agent to display on his/her computer 1146 the same web page displayed on browser 1116 while interaction with the user through telephone. It is also desirable for the service agent to obtain as much information about customer site 1104 as possible prior to commencing telephone communication with the user.

Freeform Search

Database:

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Derwent World Patents Index
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Term:

Display: `10` Documents in <u>Display Format</u>: `TI` Starting with Number `12`

Generate: ○ **Hit List**   ◉ **Hit Count**   ○ **Side by Side**   ○ **Image**

Search   Clear   Interrupt

Search History

DATE: Monday, May 10, 2004   <u>Printable Copy</u>   <u>Create Case</u>

<u>Set Name</u> side by side	<u>Query</u>	<u>Hit Count</u>	<u>Set Name</u> result set
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	DB=USPT; PLUR=YES; OP=OR		
<u>L5</u>	(agent or representative) with (obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6)same prior with (correspondance or communication or e$mail) with (user or subscriber or customer)	24	<u>L5</u>
<u>L4</u>	l3 not l2	16	<u>L4</u>
<u>L3</u>	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) same prior with (correspondance or communication) with (user or subscriber or customer) same (agent or representative)	31	<u>L3</u>
<u>L2</u>	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) same prior with (correspondance or communication) with customer same (agent or representative)	15	<u>L2</u>
<u>L1</u>	((obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) same (duplicate or copy or template) same(message or e$mail or	6	<u>L1</u>

correspondance or electronic mail) same(archived or saved or stored) same customer same (agent or representative))

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IBM Technical Disclosure Bulletins

Term:

Display: `10` Documents in **Display Format:** `TI` **Starting with Number** `1`

Generate: ○ **Hit List** ◉ **Hit Count** ○ **Side by Side** ○ **Image**

[Search] [Clear] [Interrupt]

Search History

DATE: Monday, May 10, 2004   Printable Copy   Create Case

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L15	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) near5 (duplicate or copy or template) same previousl$6 adj (transmit$6 or responded or sent or send)adj5 (message or e$mail or correspondance or electronic mail)	8	L15
L14	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) near5 (duplicate or copy or template) same previousl$6 adj (transmit$6 or responded or sent or send)adj5 (message or e$mail or correspondance or electronic mail)	8	L14
L13	(obtain$4 or inquir$5 or request$4 or generat$4 or regenerat$6) near5 (duplicate or copy or template) same (message or e$mail or correspondance or electronic mail) with(responded or sent or send or transmit$4) adj5(customer or client or user or first user or subscriber)	63	L13
L12	L11 and l10	4	L12

L10	L9 and l8	58	L10
L9	707/$.ccls.	12805	L9
L8	(retriev$4 or obtain$4 or inquir$5 or request$4)same(duplicate or copy or template) same (message or e$mail or correspondance or electronic mail) same (transmit$4 or responded or sent or send) adj5(customer or client or user or first user or subscriber)	263	L8
L7	(agent or representative or second user) same(retriev$4 or obtain$4 or inquir$5 or request$4)same(duplicate or copy or template) same (message or e$mail or correspondance or electronic mail) same(transmit$4 or responded or sent or send) adj5(customer or client or user or first user or subscriber)	10	L7

DB=PGPB; PLUR=YES; OP=OR

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L5	707/$.ccls.	7329	L5
L4	(agent or representative or second user) same(retriev$4 or obtain$4 or inquir$5 or request$4)with(previous$4 or past or first or earlier or duplicate or copy or template) with (message or e$mail or correspondance or electronic mail) with (transmit$4 or responded or sent or send) adj5(customer or client or user or first user or subscriber)	39	L4

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L3	(agent or representative or second user) same(retriev$4 or obtain$4 or inquir$5 or request$4)with(previous$4 or past or first or earlier or duplicate or copy or template) with (message or e$mail or correspondance or electronic mail) with (transmit$4 or responded or sent or send) adj5(customer or client or user or first user or subscriber)	15	L3
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L1	((agent or representative or second user) with(retriev$4 or obtain$4 or inquir$5 or request$4)with(previous$4 or past or first or earlier) near5(transmit$4 or responded or sent or send) adj5(customer or client or user or first user or subscriber))	16	L1

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WEST Search History

| Hide Items | Restore | Clear | Cancel |

DATE: Monday, May 10, 2004

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☐	L20	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6)same (duplicate or copy or template) same(message or e$mail or correspondance or electronic mail) same(archived or saved or stored) same customer	62
☐	L19	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) with (duplicate or copy or template) same (archived or saved or stored) with(message or e$mail or correspondance or electronic mail) same customer	13
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☐	L16	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) with (duplicate or copy or template) same previousl$6 adj (transmit$6 or responded or sent or send)adj5 (message or e$mail or correspondance or electronic mail)	8
☐	L15	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) near5 (duplicate or copy or template) same previousl$6 adj (transmit$6 or responded or sent or send)adj5 (message or e$mail or correspondance or electronic mail)	8
☐	L14	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) near5 (duplicate or copy or template) same previousl$6 adj (transmit$6 or responded or sent or send)adj5 (message or e$mail or correspondance or electronic mail)	8
☐	L13	(obtain$4 or inquir$5 or request$4 or generat$4 or regenerat$6) near5 (duplicate or copy or template) same (message or e$mail or correspondance or electronic mail) with(responded or sent or send or transmit$4) adj5(customer or client or user or first user or subscriber)	63
☐	L12	L11 and l10	4
☐	L11	709/206.ccls.	891
☐	L10	L9 and l8	58
☐	L9	707/$.ccls.	12805
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☐	L7	(agent or representative or second user) same(retriev$4 or obtain$4 or inquir$5 or request$4)same(duplicate or copy or template) same (message or e$mail or correspondance or electronic mail) same(transmit$4 or responded or sent or send) adj5(customer or client or user or first user or subscriber)	10

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☐	L4	(agent or representative or second user) same(retriev$4 or obtain$4 or inquir$5 or request$4)with(previous$4 or past or first or earlier or duplicate or copy or template) with (message or e$mail or correspondance or electronic mail) with (transmit$4 or responded or sent or send) adj5(customer or client or user or first user or subscriber)	39

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☐	L2	((agent or representative or second user) same(retriev$4 or obtain$4 or inquir$5 or request$4)with(previous$4 or past or first or earlier) near5(message or e$mail or correspondance or electronic mail)(transmit$4 or responded or sent or send) adj5(customer or client or user or first user or subscriber))	0
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WEST Search History

| Hide Items | Restore | Clear | Cancel |

DATE: Monday, May 10, 2004

Hide?	Set Name	Query	Hit Count
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☐	L20	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6)same (duplicate or copy or template) same(message or e$mail or correspondance or electronic mail) same(archived or saved or stored) same customer	62
☐	L19	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) with (duplicate or copy or template) same (archived or saved or stored) with(message or e$mail or correspondance or electronic mail) same customer	13
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☐	L14	(obtain$4 or retriev$4 or inquir$5 or request$4 or generat$4 or regenerat$6) near5 (duplicate or copy or template) same previousl$6 adj (transmit$6 or responded or sent or send)adj5 (message or e$mail or correspondance or electronic mail)	8
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☐	L12	L11 and l10	4
☐	L11	709/206.ccls.	891
☐	L10	L9 and l8	58
☐	L9	707/$.ccls.	12805
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DB=PGPB; PLUR=YES; OP=OR

☐	L6	L5 and l4	1
☐	L5	707/$.ccls.	7329
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DB=USPT; PLUR=YES; OP=OR

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